

Administering ACT! 2010

The Basics

- So You Get to be the ACT! Administrator
- ACT! vs. ACT! Premium
 - Premium Version Editions
- Log on
- Opening a Database
 - Setting Up For Class
 - Opening Other Databases
- Contact Record Basics Review
 - The Anatomy of a Contact Record
 - The “My Record” Contact Record
 - Our Practice Database

Setting Up

- Using Available Documentation
 - Using the ACT! Knowledge Base
- Setting Up a Multi-User Database
- Examining Structure
 - File Structure
 - Directory Structure
 - Transferring the Database
 - Enable Share on Existing Database

Configuring & Installing Workstations

- Pre-Install Checklist
 - Do you have right ACT! version?
 - Is your other software compatible?
 - Meet Minimum System Requirements?
 - Verify 2GB Free Space
 - Ensure File/Printer Sharing Enabled
 - Set System Restore Point
 - Verify Local Administrator Rights
- Pre-Install Tasks
 - Create install folder
 - Uninstall earlier versions
- Installing on Workstations
- Applying Some Performance Tweaks
- Understand/Modify User Preferences
 - File Locations for Multi-User Database
 - Setting Up E-mail System in ACT!

Database Security

- Database Security
- Understanding Security Roles
 - Custom Permissions
- Creating New Logon Users
 - Making Users Inactive

- Password Management
 - Defining a Global Password Policy
 - Overriding Password Policy for Individ
 - Setting a Password for Yourself
- Team Management
 - Limiting Contact Access
 - Assigning Limited Access to a Lookup
 - Lookup Contacts by Access
 - “Managers” Team
 - Changing Security for Multiple Items
- Field Security

Database Administration

- General Database Maintenance
 - Automatic Update Notification
 - Back Up
 - Automatically Backing Up Database
 - Manually Backing Up Your Database
 - Restoring a Backup
 - Deleting a Database
 - Check and Repair
 - Scheduling Database Maintenance
 - Checking the ACT! Scheduler Log
- Importing an Excel File
 - Converting the Excel File to .CSV file
 - Importing a .CSV File into ACT!
- Cleaning up the Data
 - Duplicates
 - Tips for Dealing with Duplicates
 - Combine Duplicate Records
 - Changing Default Duplicate Checking
 - Edit, Replace
 - Edit, Swap or Copy Fields
 - Remove Old Data
- Events

Advanced Lookups

- Activity Data Mining
- Queries
 - Lookup By Example
- Advanced Queries
 - And/Or Revisited
 - Grouping
 - Deleting Query Files
- Creating/Populating a Group or Company
 - Adding Multiple Contacts to a Group
 - Advanced Queries Companies/Groups

Administering ACT! 2010

Synchronization Maintenance

- Synchronizing Databases
- Administrator Tasks – Preparation
 - Determine/Setup Connection Method
 - Define Remote User(s)
 - Restore Database to Final Location
- Administrator Tasks – Creating Sync DB
 - Enable Synchronization
 - Manage Sync Sets
 - Create Remote Databases
 - Prepare the Remote Database(s)
- Administrator Tasks – Turning on Sync
 - Setting Up Application Sync
 - Setting Up the Network Sync Service
 - Setting Up Internet Sync
- User Tasks – Remote Database
 - Modifying Setup for Internet Sync
 - Synchronizing the Remote Database
 - Set Up a Sync Schedule with Scheduler
 - Using the Subscription List
- Administrator – When Things Change
 - Moving Machines
 - Territory Realignment
 - Temporarily Disabling Sync
- Synchronization Troubleshooting

Appendix

- User Roles and Permissions
- Converting an older ACT! Database
 - Standard vs. Custom Conversion

Index
